

NTGDIS Death Benefit Claim Form

Refer to *Death Benefit fact sheet* for more information about the Northern Territory Government Death and Invalidity scheme (NTGDIS).

1. Who should complete this form?

Complete this form if you are claiming a death benefit in respect of a deceased NT Government employee who was in choice of fund superannuation arrangements.

If the deceased person was a member of the Northern Territory Government and Public Authorities Superannuation Scheme (NTGPASS) or the Northern Territory Supplementary Superannuation Scheme (NTSSS), please complete the *NTGPASS & NTSSS Death Benefit Claim Form*.

2. Supporting documentation

In addition to this form, you must submit certified copies of the following (as appropriate) so that we can calculate and process death benefits:

- Will (if one exists)
- death certificate
- Grant of probate, letters of administration or election to administer a small estate, granted by the Supreme Court of the Northern Territory
- marriage certificate
- children's birth certificates
- bank statements
- statutory declarations
- certified identification of claimant

3. Death benefit estimate

If you are managing the estate of a deceased member, you can obtain an estimate of the deceased's NTGDIS benefits by emailing ntsuperannuation@nt.gov.au. You must attach the certified copy of the death certificate and evidence the deceased had a dependant (see section 4 below) to your email.

4. NTGDIS death benefit

NTGDIS members may be eligible for a death benefit (paid as a superannuation lump sum), equivalent to:

17.5% x benefit salary x prospective service

Prospective service is the difference between the age at death and age 65. Members aged 60 and over are not eligible for a death benefit and the amount reduces gradually from age 50 to 59. The benefit may be offset by any amount paid under workers' compensation legislation.

5. When will the benefit be paid?

Benefits are processed within 30 days of receipt of all required documentation, as required by relevant legislation. The documentation includes those requested on this form as well as information provided by the deceased's payroll department where relevant.

6. Taxation

NTSO does not withhold tax from death benefits where they are paid directly to an estate. Tax may be withheld in circumstances where a payment is made directly to a beneficiary who is not a death benefit dependant for tax purposes. Whether a death benefit is subject to taxation in the hands of a beneficiary can depend on various circumstances, including whether the Australian Tax Office (ATO) deems the beneficiary to be a dependant. The ATO's definition of a 'dependant' differs from that of the Northern Territory Superannuation Office.

Seek taxation advice from a qualified professional if you require further information.

7. How to fill out this form

Section 1 – About the deceased

Complete all fields of this section to enable us to identify the correct account.

Section 2 – Your details

Complete all fields of this section to enable us to identify you and record your contact details. You are also required to provide certified identification. Tick the appropriate box if you are the executor of the estate.

Section 3 – Executor/Administrator details

If you are not the executor or administrator, provide that person's details.

Section 4 – Dependant details

Use this section to record details about all of the deceased's dependants at the date of death. We will use these details to calculate any death benefits payable.

Spouse – attach a certified copy of the marriage certificate, issued by the relevant public authority.

In the case of tribal marriages or defacto relationships, attach a statutory declaration to that effect, as well as statutory declarations completed by two persons outside the immediate family who can provide a statement that the relationship existed on a permanent and bona fide domestic basis.

Child – attach a certified copy of the birth certificates.

Other dependant – attach a statutory declaration (signed by the dependant), that at the date of death, they were wholly or partially financially dependent on the deceased, or were in an interdependency relationship with the deceased.

Section 5 – Applying for advance payment

Death benefits are generally paid to a deceased member's estate. However, the Commissioner of Superannuation has the discretion to make an immediate advance payment of up to \$30 000 without requiring probate or letters of administration for either the following purposes:

- the payment is made towards the expenses of the deceased's funeral – in this instance a copy of the funeral invoice is required
- the payment is made to a dependant or dependants of the deceased.

The dependant will need to provide evidence of their relationship with the deceased, such as copies of birth certificates, marriage certificates or statutory declarations confirming the relationship (see Statutory Declaration (A) – Dependant/de facto spouse attached to this form).

The Commissioner can also make an advance payment in excess of \$30 000 if the payment is to the deceased's dependant, and the Commissioner is of the opinion that the payment will alleviate that person's financial hardship. For these claims, the dependant will need to provide a detailed explanation of their financial situation, accompanied by supporting documents such as unpaid bills and living expenses.

In considering advance payment applications, the Commissioner will have regard to:

- the total amount of the NTGDIS benefit
- who is applying and their relationship to the deceased
- who else is a dependant of the deceased, and their relationship to the deceased.

If an advance payment is made, this amount is deducted from the death benefit that would otherwise be payable to the deceased's estate.

Section 6 – Bank account details for payment

If the total benefit is less than \$30 000, you may apply to have the benefits paid directly to you. To be eligible, you must be the sole beneficiary and no other person will be claiming an amount from the estate. A sole beneficiary claim must also provide the Statutory Declaration (B) – Sole Claimant attached to this form.

An Australian bank account must be used for approved payments to beneficiaries. Where the total benefit amounts to more than \$30,000, payment must be made to the deceased's estate by cheque, or by eft to a bank account of 'The Estate of the deceased'. Further details on payment options will be provided on receipt of Grant of probate, letters of administration or election to administer a small estate, granted by the Supreme Court of the Northern Territory.

Section 7 – Document checklist

Ensure you have attached all appropriate certified documentation. Failure to provide required documents may cause delays to the payment of benefits.

8. How to submit this form

Submit your completed application by mail or email to:

NT Superannuation Office
GPO Box 4675
Darwin NT 0801

ntsuperannuation@nt.gov.au

9. More information

Being responsible for the administration of a deceased estate can be time-consuming and challenging. NTSO staff can assist in this process by providing information, however they cannot provide financial advice. If you require assistance, you can seek the services of a qualified professional such as financial advisor or a legal representative that specialises in estate planning.

The [MoneySmart website](#) provides advice on how to choose a financial advisor.

We recommend you seek professional advice before making any decisions regarding the management or distribution of a deceased estate.

There are a number of online resources that may be helpful from our website

www.treasury.nt.gov.au/dtf/superannuation

- Northern Territory Government Death and Invalidity Scheme fact sheet
- NTGPASS & NTGDIS Death Benefits fact sheet
- Proving Your Identity fact sheet
- Identity Certification form

Searching for lost super: www.ato.gov.au/forms/searching-for-lost-super/

About the Public Trustee: <https://nt.gov.au/law/processes/public-trustee-of-the-nt>

NT Supreme Court wills and probate: <https://supremecourt.nt.gov.au/about/registry/wills-and-probate>

10. Disclaimer

The material in this form is provided for information purposes only and should not be relied upon for making financial commitments.

The Commissioner of Superannuation and the Northern Territory of Australia accepts no responsibility for any losses arising from any use or reliance upon the information or conclusions reached using the information.

Application form

Section 1 – Personal details of the deceased

Full name			
Residential address			
Postal address			
Member number (AGS)			
Date of birth		Date of death	

Section 2 – Your personal details

Full name			
Residential address			
Postal address			
Email			
Date of birth		Tax file number [†]	
Phone		Mobile	

- ☐ **I am the executor/administrator of the estate.** If this is not you, please provide those details at Section 3 (below).
[†]Australian legislation authorises superannuation funds to collect your Tax File Number (TFN), which will only be used for lawful purposes. If you do not provide your TFN, your benefit will be taxed at the highest marginal tax rate.

Section 3 – Executor/Administrator details

Full name			
Postal address			
Phone		Mobile	
Email			
Tax file number			

Section 4 – Dependant details (including your own details, if applicable). Refer to the notes section for details on required certified documentation. Attach additional details if there are more than four dependants. Complete Statutory Declaration (A) if dependant was tribally married or a de facto spouse.

Surname	Given names	Date of birth	Relationship to deceased
1.			
2.			
3.			
4.			

Section 5 – Applying for advance payment

In certain circumstances you may apply to the Commissioner to have an amount paid directly to you or a dependant prior to obtaining probate or letters of administration. More information on these payments is set out at Note 7, Section 5.

Tick the appropriate box, request an amount and provide the appropriate attachments.

☐ Funeral and other associated costs (attach invoices or quotes)	\$
☐ Payment to dependant or dependants (provide evidence of relationship)	\$
☐ To alleviate financial hardship (provide evidence)	\$

Section 6 – Bank account details for payment

- Complete the below if claiming a benefit less than \$30 000. Benefits less than \$30 000 can be paid to a claimant's bank account or by cheque if approved by the Commissioner of Superannuation.
- Complete the below if applying for an advance payment at Section 5.
-

If approved, I request the payment be made to the following Australian bank account:

Bank name			
BSB no.		Account no.	
Account name(s)			

Section 7 – Document checklist (select those you have provided)

☐ Will	Required in all circumstances (if a Will exists)
☐ Certified identification of claimant	Required in all circumstances
☐ Death certificate	Required in all circumstances
☐ Bank statements	Required in all circumstances where Electronic Funds Transfer is requested to the estate's bank account. The statement must be in the name of the deceased member's Estate. Bank statements are not required for advance payment.
☐ Probate, Letters of Administration or Election to Administer Small Estate	Required for benefits over \$30 000 – must be issued by Supreme Court of the Northern Territory
☐ Marriage certificate	Required for proof of dependency
☐ Children's birth certificates	Required for proof of dependency
☐ Statutory declaration	Required for proof of dependency and de facto/traditional spouse (see Declaration A)
☐ Statutory declaration	Required for proof of being sole claimant of death benefit (see Declaration B)
☐ Other documents (please specify)	As required, for example funeral invoice, evidence of financial hardship, details of workers compensation

Privacy statement

The Northern Territory Superannuation Office is a division of the Department of Treasury and Finance, a Northern Territory Government Agency. The privacy and confidentiality of your personal information is important to the Northern Territory Superannuation Office. The information collected will only be used for the purpose for which it was supplied for administering your superannuation account and your information will not be disclosed to any third party unless required by law or authorised by you. To obtain further information about the Northern Territory Government privacy policy or the Information Act, please visit the Northern Territory Government website at www.nt.gov.au.

Declaration

I understand that the personal details requested on this form will only be used to process my request and to administer the deceased member's NTGDIS benefit.

Applicant signature:

Date:

Internal use only

☐ **Advance payment approved**

☐ **Tax payable on advance payment**

Commissioner of Superannuation:

Date:

☐ **Death benefit approval**

Commissioner of Superannuation:

Date:

Statutory Declaration (A) – Dependant/de facto spouse

1	Insert the name and residential address of person making the declaration	I, ¹ _____
		of _____
		solemnly and sincerely declare that:
2	Please circle the appropriate	I am the dependant or de facto spouse ²
3	Name of deceased member	of ³ _____
4	Residential address of deceased member	of ⁴ _____
		I make this solemn declaration by virtue of the <i>Oaths, Affidavits and Declarations Act 2010</i> conscientiously believing the statements contained in this declaration to be true and understand that it is an offence to make a statutory declaration that is false in any material particular.
5	Place	Declared at ⁵ _____ on the ⁶ _____ of ⁷ _____ 20
6	Day	
7	Month and year	_____
8	Signature of person making the declaration	⁸ _____
9	Signature of person before whom the declaration is made; person must be over 18 years of age	⁹ _____
10	Full name, address or contact telephone number of person before whom the declaration is made (in printed letters)	¹⁰ _____

NOTE: This declaration may be witnessed by any person who is at least 18 (eighteen) years of age. NTSO staff will not act as a witness for this purpose.

NOTE: This written statutory declaration must comply with Part 4 of the *Oaths, Affidavits and Declarations Act 2010*.

NOTE: Any attachment to this written statutory declaration must include on its front page a statement identifying it as the attachment belonging to this particular statutory declaration under Part 4 of the *Oaths, Affidavits and Declarations Act 2010*. Attachments which are copies of original documents must be certified.

Statutory Declaration (B) – Sole claimant

1	Insert the name and residential address of person making the declaration	I, ¹ _____
		of _____
		solemnly and sincerely declare that:
2	Please circle the appropriate	I am the only person claiming the NTGDIS death benefit ²
3	Name of deceased member	of ³ _____
4	Residential address of deceased member	of ⁴ _____
		There is no other person claiming this benefit/these benefits. I make this solemn declaration by virtue of the <i>Oaths, Affidavits and Declarations Act 2010</i> conscientiously believing the statements contained in this declaration to be true and understand that it is an offence to make a statutory declaration that is false in any material particular.
5	Place	Declared at ⁵ _____ on the ⁶ _____ of ⁷ _____ 20
6	Day	
7	Month and year	_____
8	Signature of person making the declaration	⁸ _____
9	Signature of person before whom the declaration is made; person must be over 18 years of age	⁹ _____
10	Full name, address or contact telephone number of person before whom the declaration is made (in printed letters)	¹⁰ _____

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